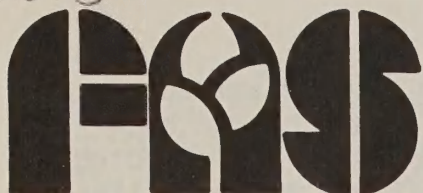


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REPORT

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MAR 10 '83
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United States
Department of
Agriculture
Foreign
Agricultural
Service
Washington, D.C. 20250

WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 3-83

WASHINGTON, Jan. 19--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

EC TRADE NOTES

The EUROPEAN COMMUNITY COMMISSION has modestly increased the amount of aid granted for the use of nonfat dry milk (NFDM) in feed for animals other than calves in an apparent attempt to boost participation in this program. The level of aid was increased from 92 ECU's per ton to 94. EC NFDM ending stocks in 1982 are now estimated at between 550,000 to 600,000 tons, compared with 385,000 in June 1982. This action seems to confirm that the initial program for using more NFDM in feed has not been as successful as desired and that NFDM stocks are still building. This program could also eventually have an impact on EC utilization and imports of soybeans, soymeal or other feed ingredients.

OILSEEDS AND PRODUCTS

SPAIN increased the turnover tax rate on domestically produced soybean meal by about 15.5 percent on December 29. The rate applied to the sale of imported soybean meal is unchanged. Spanish soybean crushers have protested this action on grounds that it penalizes domestic meal and encourages imports. To remain competitive, Spanish crushers will have to reduce prices by \$1.30 to \$1.60 per ton, representing a loss of close to \$5 million in 1983. Reportedly, however, this discriminatory tax treatment is not likely to reduce the market for domestically produced soybean meal significantly, nor consequently the market for imported soybeans. Soybean oil for domestic consumption is not taxed because it is purchased by the government, and the tax on exported oil is refunded.

DAIRY, LIVESTOCK AND POULTRY

CANADA reportedly does not expect to impose beef import controls during 1983. Canada's minimum access agreed to in the General Agreement on Tariffs and Trade will be 143.6 million pounds this year.

Imports are currently estimated at 130 million-135 million pounds. New Zealand and Australia are Canada's largest suppliers. During January-November 1982 the United States supplied just under 8 million pounds of fresh, chilled or frozen beef and veal. Canada makes a new import estimate each quarter.

LYNN KRAWCZYK, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Information Services Staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

In DENMARK, a new outbreak of foot and mouth disease was confirmed on the Island of Funen on January 14. The same island had an outbreak between March and June 1982. Reportedly, all animals on the affected farm have been destroyed and the area isolated. In addition, a ban on live-stock sales and commercial slaughter has been applied to the Island of Funen.

Last spring's outbreak caused several countries, including Japan and the United States, to ban pork imports from Denmark. Prior to this latest outbreak, Japanese pork importers had been pushing for an early lifting of the ban. However, with the new outbreak, that ban will likely be extended.

Total wool production during 1983 in SELECTED COUNTRIES, which account for 70 percent of world production, is expected to change little from 1982. Drought in Australia is expected to cut production by 3 percent, while improved pasture conditions and record sheep inventories are expected to result in a near 5-percent increase in New Zealand's wool production. In the other selected countries, wool production is expected to show little change. Data are as follows in 1,000 tons.

	1980	1981	1982	1983
United States	48	50	50	51
Argentina	171	170	173	175
Australia	709	700	716	694
New Zealand	357	381	363	380
South Africa	103	105	110	108
Uruguay	70	81	72	75
United Kingdom	48	52	51	51
USSR	478	464	474	476
Turkey	59	60	61	61
Total above	2,043	2,063	2,070	2,071

Source: Based upon Wool Quarterly and U.S. agricultural attache reports.

TOBACCO

The 1983 tobacco crop in the DOMINICAN REPUBLIC is estimated at 43,300 tons, about equal to last season's output. Harvested area is also expected to remain about the same as in 1982 at 35,400 hectares. An outbreak of blue mold disease for the third consecutive season is expected to keep yields at the same low level as the past two seasons. The government and the Tobacco Institute have distributed 36 tons of free fungicides to small tobacco growers in response to the current season's outbreak.

-more-

The SOVIET UNION's 1982 tobacco crop is forecast at 300,000 tons (295,000 tons of oriental and 5,000 tons of Makhorka), according to the U.S. agricultural counselor in Moscow. Higher harvest levels in 1982 were the result of improved weather and slightly larger estimated area of 186,000 hectares.

According to Soviet statistics, the 1981 tobacco harvest--at 273,000 tons--was the lowest in seven years. Earlier estimates in a recent Soviet tobacco journal placed the crop at 280,000 tons (excluding Makhorka). This was down from the 1980 crop because of drought.

SUGAR

WEST GERMANY's sugar production from the just completed 1982/83 harvest was 3.6 million tons, raw value, only 3 percent below the record 1981/82 level. Both beet yields and sugar content were higher than the previous season's, partially offsetting the effects of an 8-percent smaller beet area.

FRUITS AND NUTS

Inclement weather and disease problems significantly lowered WORLD output of most major tree nuts during 1982. World almond production, previously estimated at 258,300 tons (shelled basis), has been lowered to 248,900 tons as a result of smaller than anticipated crops in the United States and Portugal. This revised estimate represents a 19-percent decline from the record world crop of 305,900 tons a year earlier.

World filbert production is now placed at 385,800 tons (in-shell basis), up slightly from the September 1982 forecast of 382,900 tons but 22 percent below world output in 1981. The production estimate for Turkey, the world's leading producer of filberts, remains unchanged at 250,000 tons--down more than a third from the record crop of last season.

Spurred by a record crop in the United States, world pistachio production in 1982 is now expected to reach 64,600 tons (in-shell basis), 8 percent greater than the November 1982 estimate of 59,900 tons, but 23 percent below the record world harvest of 84,100 tons during 1981.

-more-

Based on current estimates, 1982 was a record year for walnut production with world output forecast to reach 272,100 tons (in-shell basis). The U.S. crop has been revised upward and is now expected to equal the record 204,100 tons produced last season. Data are as follows in 1,000 tons:

ALMONDS			FILBERTS		
	1981	1982 1/		1981	1982 1/
United States	185.1	156.5	Turkey	380.0	250.0
Spain	80.0	60.0	Italy	80.0	100.0
Italy	25.0	16.0	Spain	22.0	19.0
Turkey	8.3	10.0	United States	13.3	16.8
Portugal	3.5	3.9	Total	495.3	385.8
Morocco	4.0	2.5			
Total	305.9	248.9			
PISTACHIOS			WALNUTS		
	1981	1982 1/		1981	1982 1/
Iran	41.5	22.5	United States	204.1	204.1
United States	6.6	19.7	France	10.0	30.0
Turkey	20.0	10.0	India	18.0	18.0
Syria	9.2	10.0	Italy	13.0	11.0
Greece	2.3	2.2	Turkey	8.0	9.0
Italy	4.5	0.2	Total	253.1	272.1
Total	84.1	64.6			

1/ Preliminary.

Selected International Prices

Item	: January 18, 1983		: Change from		: A year	
	:		: previous week		: ago	
	\$ per MT	\$ per bu.	\$ per MT		\$ per MT	
ROTTERDAM PRICES 1/						
Wheat:						
Canadian No. 1 CWRS-13.5%*	199.00	5.42	-1.00		N.Q.	
U.S. No. 2 DNS/NS: 14%*...	186.25	5.077	+2.25		188.00	
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--		202.00	
U.S. No. 2 S.R.W.....	159.00	4.33	+5.50		171.00	
U.S. No. 3 H.A.D*.....	171.00	4.65	+1.50		194.00	
Canadian No. 1 A: Durum*..	194.50	5.29	-.50		213.00	
Feed grains:						
U.S. No. 3 Yellow Corn....	119.00	3.02	+2.25		132.00	
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--		144.00	
Feed Barley 3/.....	N.Q.	--	--		N.Q.	
Soybeans and meal:						
U.S. No. 2 Yellow.....	237.25	6.45	+2.75		267.50	
Brazil 47/48% SoyaPellets 4/	234.00	--	+1.50		N.Q.	
U.S. 44% Soybean Meal.....	217.50	--	-.50		250.00	
U.S. FARM PRICES 5/						
Wheat.....	130.44	3.55	+1.47		138.16	
Barley.....	64.30	1.40	+1.38		85.89	
Corn.....	91.33	2.32	+1.97		94.66	
Sorghum.....	92.59	4.20 6/	+1.32		90.61	
Broilers 7/.....	952.39	--	+23.59		1179.46	
EC IMPORT LEVIES						
Wheat 8/.....	108.03	2.94	-8.17		88.70	
Barley.....	115.07	2.50	-.03		74.45	
Corn.....	111.20	2.82	-4.10		93.70	
Sorghum.....	104.80	2.66	-1.35		85.30	
Broilers 9/.....	309.00	--	-4.00 10/		244.00	
EC INTERVENTION PRICES 11/						
Common wheat(feed quality)	188.20	5.12	-2.42		188.20	
Bread wheat.....	207.60	5.65	-2.17		217.15	
Barley and all						
other feed grains.....	188.20	--	-2.42		188.20	
Broilers 12/.....	1082.00	--	-7.00		--	
EC EXPORT RESTITUTIONS (subsidies)						
Wheat.....	81.05	2.21	-3.37		63.80	
Wheat flour.....	N.Q.	N.Q.	N.Q.		N.Q.	
Barley.....	N.Q.	--	--		37.40	
Broilers 9/.....	199.00	--	-3.00 10/		142.00	
Sugar, refined 13/.....	361.00	--	375.00		N.Q.	

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Nine-city average; wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Change in dollar value of broiler levy or restitution generally reflects currency fluctuations and not change in level set by EC. 11/ Basically the intervention price is the EC farm price support, determined annually. 12/ F.o.b. price for whole R.T.C. broilers at West German border. 13/ Week of Jan. 19, based on a maximum subsidy of 37.919 ECU's per 100 kg. N.Q.=Not quoted.

Note: Basis February delivery. * April-May.

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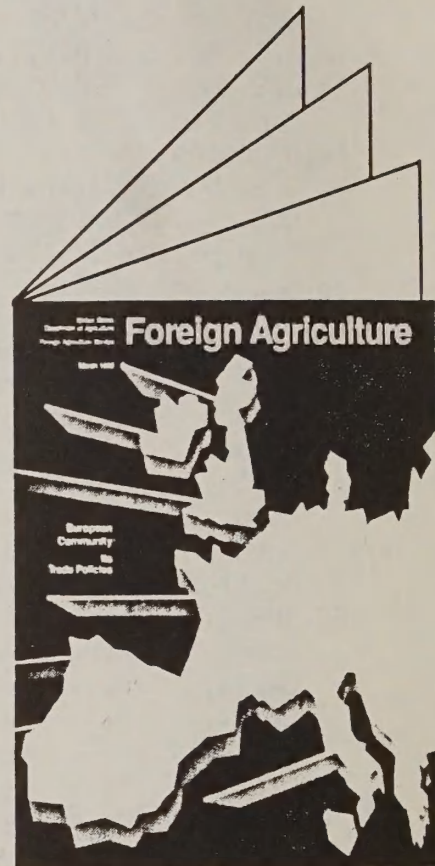
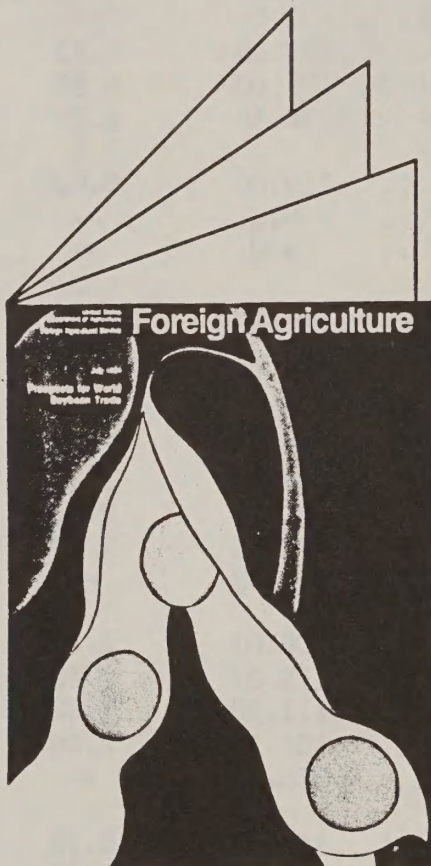
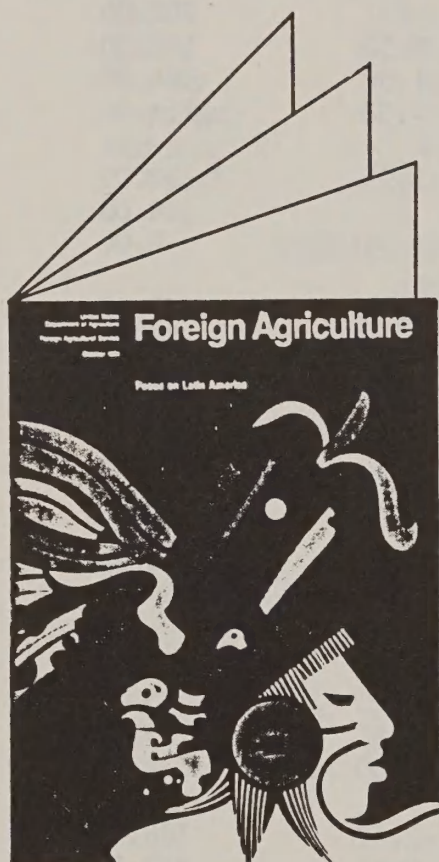
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